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DDI-2296-61

11 July 1967

MEMORANDUM FOR: Assistant Deputy Director for Intelligence

SUBJECT: OCR Referral System

I. SYSTEM OUTLINE

During our planning for the reorganization of OCR, we examined several possible approaches to the development and operation of a referral system. We have concluded that the most practical system is the simplest one, namely, one based upon direct communication between OCR analysts and the production components and controlled by effective management review. In brief, we propose to have OCR analysts operate the referral system through the use of listings, furnished by the production offices, which will show the area and subject specialties of the various branches, sections, and analysts with comments, where appropriate, specifying the types of requests that the offices have agreed to handle. Requests received by OCR which more properly should be handled by a production office will be referred directly by the OCR analysts to the production office responsible for that subject. Further, OCR analysts making referrals will periodically follow-up with customers to determine customer reaction and satisfaction.

II. ACTIONS REQUIRED FOR IMPLEMENTATION

A. ACTIONS BY THE DDI

It is requested that the DDI direct the production offices of the DDI to cooperate in the operation of the referral system, to designate a representative to work with OCR on referral matters, and to provide guidance to OCR on the types of inquiries that they would be willing and able to handle. It is suggested that the DDI attempt to obtain the same type of cooperation from OSI and FMSAC in the DDS&T.

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GROUP 1
Excluded from automatic
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B. ACTIONS BY THE PRODUCTION OFFICES

Each of the production offices cooperating in the system will designate a person who will represent his office on referral matters and assist OCR in the implementation of the system. This person will not be asked to handle the referral inquiries from OCR but will be used to provide information to OCR on organizational and analyst specialties and to handle special problems encountered in dealing with analysts in his office. The initial task of this person will be to prepare a listing of his office's analysts, by subject and area speciality, and an initial statement on the subjects and types of questions that the office would be willing to have referred to it. The production offices will brief their analysts on the referral system and direct them to cooperate.

C. ACTION BY OCR

OCR will use the listings furnished by the production offices to compile a directory of production office specialties. OCR will examine the production office statements of the types of referrals that they will be able and willing to handle and will discuss with the production office representative additions and clarifications as necessary. The results of the discussions will be consolidated by OCR and issued to OCR analysts as a guide in operating the referral system. Copies will also be furnished to the production offices. OCR will establish a procedure for creating records of the reference inquiries that it receives so that its management can review these records to ensure, in so far as possible, that OCR analysts are making maximum use of the system. OCR will sample customer reactions to the referral service and at the end of six months of operation will furnish the DDI with an evaluation of the system.

III. CONCLUSION

If you approve this general plan, we would like to have the production offices furnish us with the names of their representatives and their initial policy statements by 1 August 1967. We would have the discussions with the production offices and the preparation of the guides completed on or about 15 September when our first area division begins operation.

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Acting Director of Central Reference

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